PRESENTERS

DAVID SEYMOUR is the Senior Public Affairs Specialist for Region VII of the Social Security Administration. He began his federal service as a Congressional Aide, then joined SSA in the Chicago Region where he served as a Claims Representative, Operations Supervisor and Public Affairs Specialist. In 2016, David relocated to Kansas City to serve as a Technical Training Instructor for new SSA employees nationwide. He has also taught Spanish language and Latin dance in community and academic settings. His current duties in the Regional Public Affairs Office include serving as a liaison for congressional offices, assisting with media inquiries, and promoting public awareness and understanding of the programs Social Security administers.

JULIE BROOKHART & JOHN MONTALTO Julie, Public Affairs Specialist, works for the Centers for Medicare & Medicaid Services, (CMS), Kansas City Regional Office. Julie has worked for CMS for 24 years in Public Affairs, Media Relations, Education and Outreach, and leads the Regional External Affairs team in Region 7, who works to educate organizations, including employers, universities, associations, health care industry staff and consumers on CMS' programs for the benefit of the people they serve or for themselves so consumers can make the best health care insurance choices. The Region 7 Kansas City Regional Office for CMS, administers these programs for the states of Iowa, Kansas, Missouri and Nebraska. Julie holds a Bachelor's Degree in Education from the University of Kansas, with courses in Journalism. John Montalto has worked for CMS for 5 years as a Health Insurance Specialist. John received his MSW from Fordham University in New York City and is a licensed clinical social worker in New York State. John has held leadership positions for the New York State Office of Mental Health, as well as the Minneapolis VA Medical Center. John served in Iraqi Operation Enduring Freedom as a Combat Stress Control Officer for the U.S. Army.

JANE SCHEIDLER is an Account Representative in the Education and Outreach department at Long Term Care Partners, which administers the Federal Long Term Care Insurance Program (FLTCIP). Jane joined LTC Partners in 2014 as a Customer service/Claims Consultant, assisting members of the federal family with all aspects of their policies. She became a member of the Education and Outreach call center team in August 2015 and was promoted to Account Representative in September 2017. She works directly with federal agencies to facilitate long term care training and education both onsite and through virtual channels. Jane is a certified Long Term Care Insurance Consultant (CLTC) and a Long Term Care Professional (LTCP). She currently lives in Exeter, NH with her husband, two college-aged kids and her black lab, Rondo.

JAMES A. MCCLURE has been licensed as an attorney since 2017. The major emphasis of his law practice is in the areas of Estate Planning, Elder Law, Special Needs Trusts, and planning for persons who have a disability. He is licensed to practice law in the state of Missouri. Mr. McClure has a Bachelor of Science in Business Accounting from the University of Kansas, and a law degree (J.D., Juris Doctor), *Magna Cum Laude*, and Masters of Law (LL.M.) in Taxation from the University of Missouri - Kansas City. Mr. McClure is involved with many professional activities, including member of the National Academy of Elder Law Attorneys ("NAELA"), and an active member of the Tax Steering Committee for the NAELA, member of the Missouri Chapter of the National Academy of Elder Law Attorneys.

RANDY HALLIER serves as a Managing Director with Creating Planning, working directly with clients to develop and implement a strategy to address their financial, investment, tax, and estate planning needs. Prior to joining Creative Planning, Randy was the President and Founder of Retirement Plus, Inc. in Leawood, Kansas where he served as the Chief Compliance Officer as well as the Co-Executive Investment Officer for the firm. The philosophies of Retirement Plus Inc. and Creative Planning both ascribe to the comprehensive and holistic method of incorporating financial planning, tax planning, investment management, and estate planning within a single relationship. Randy was recognized as advisor of the year 2009 by Reuters Advice Point. Randy has been ranked as the #26 Financial Advisor in the state of Florida on Barron's list of 'Top Financial Advisors by State' (2019*). He is also a published writer and author and is responsible for contributing numerous articles over the years to Boomer Magazine, Research Magazine and other periodicals. He provided the foreword for the book, The Art of Investing and Portfolio Management and is the author of the book How to Work for Uncle Same and Retire Rich. Randy also founded the radio show program The Bottom Line and has been a frequent guest on numerous other radio and television programs that feature financial and investment related topics. Randy also founded Financial Workshops, LLC, a leading provider of financial training to large employers. As a skilled presenter, he has led more than 500 workshops for various organizations and Federal agencies throughout the country over the past 20 years. Randy attended the University of Kansas and majored in education and completed his academic career at the University of Missouri at Kansas City Bloch School of Business where he obtained his certificate in financial planning. Randy is a Certified Financial Planner™ practitioner and subscribes to the ethical requirements as set forth by the Certified Financial Planner Board of Standards®. Randy enjoys sailing his own boat as well as chartering sail boats throughout the world.

116TH FEB PRE-RETIREMENT SEMINAR

JUNE 5, 2019

AGENDA

7:30 A.M.	REGISTRATION	
8:00 A.M.	WELCOME	**STEPHANIE WILLIAMS** Planning Committee Chairperson Equal Employment Opportunity Commission
8:10 A.M.	PRESENTATION	**SOCIAL SECURITY** David Seymour Social Security Administration
8:55 A.M.	PRESENTATION	**MEDICARE** Julie Brookhart & John Montalto US Department of Health and Human Services Centers for Medicare & Medicaid Services
9:55 A.M.	*BREAK*	
10:05 A.M.	PRESENTATION	**LONG TERM CARE** Jane Scheidler Long Term Care Partners
10:45 A.M.	PRESENTATION	**ESTATE PLANNING** James McClure Reaves Law Firm, P.C.
12:00 P.M.		**LUNCH**
1:00 P.M.	PRESENTATION	**THRIFT SAVINGS PLAN** Randy Hallier Financial Workshops, LLC
2:25 P.M.	*BREAK*	
2:40 P.M.	PRESENTATION	**CSRS** and **FERS** Randy Hallier Financial Workshops, LLC
4:30 P.M.	ADJOURN